



BUSINESSatOECD

Business and Industry Advisory
Committee to the OECD

Health and Life Sciences Competitiveness

High-Level Roundtable Key Messages

March 2026

Context of the Roundtable

On 21 January 2026, *Business at OECD* (BIAC) and the French Healthcare Association convened, as an official side event of the French Healthcare Business Forum, a high-level Roundtable on Health and Life Sciences Competitiveness at the OECD Headquarters in Paris.

Bringing together over 90 senior representatives from governments, international organisations, industry, and health stakeholders, the roundtable provided a timely platform, against the backdrop of mounting pressures on health systems and in the context of the 2026 French G7/B7 Presidency, to examine how health and life sciences can be more firmly positioned as strategic drivers of economic competitiveness and long-term growth.

The discussions focused on two core themes: (i) the economic case for investments in life sciences and health competitiveness, demonstrating quantifiable returns and strategic value for countries; and (ii) cross-cutting policy approaches to bridge health, economic, and industrial policies to unlock innovation.

This paper summarises the key messages delivered by participants throughout the roundtable.

“Health is directly exposed to today’s complex international environment. Economic uncertainty, rising geopolitical tensions, and fragile global supply chains are directly affecting the health and life sciences sectors. These external pressures compound existing structural challenges (ageing populations, the growing burden of chronic diseases and cancers, and environmental change, among others) making resilience and coordinated policy action more urgent than ever.”

Key Messages from the Roundtable

Message 1: Health and Life Sciences as Strategic Economic Assets

Health should be treated as a long-term strategic investment, not merely a budgetary cost. Strong health systems, together with both healthy and productive populations, are increasingly recognised as essential competitiveness and economic security, both at national and international scale. Therefore, investments in health and life sciences generate **multiplier effects** across the economy, boosting productivity, supporting job creation, attracting talent, and fostering technological leadership, among others. These economic and social returns can materialise quickly: for instance, prevention, early detection, or timely intervention, directly reduce absenteeism, improve labour market participation, as well as help ease long-term fiscal pressures.



The Ambassador and Permanent Representative of France to the OECD Cyrille Pierre, provided opening remarks.

Message 2: Need for Policy Coherence and Cross-Government Action

Fragmented policymaking across health, economic, industrial, as well as innovation portfolios undermines both the predictability and the global competitiveness of life sciences ecosystems. In particular **financing coherence** is a critical lever for reinforcing prevention, early diagnosis, as well as the

uptake of innovation to ensure long-term health system sustainability. A coordinated cross-government framework will enhance investment certainly, accelerate the translation of research into patient access, and strengthens both health resilience and economic performance. Governments must adopt **whole-of-government approaches** grounded in shared strategic objectives and coordinated policy instruments, with multi-year planning horizons. **Policy alignment across ministries** is essential to ensure that innovative incentives and budgetary frameworks operate coherently rather than at cross-purposes.



Isabelle Deschamps, Head of Public Affairs, Sanofi France, provided context setting.

Message 3: Targeting the Full Life Sciences Value Chain

Competitiveness gains result from viewing the life sciences ecosystem **holistically**, rather than prioritising segments in isolation. Considering that research and development (R&D), clinical trials, manufacturing, healthcare delivery, diagnostics, and data infrastructure are deeply interconnected, fragmentation or incoherent policies weaken overall impact. Recent studies show that countries competing successfully for life sciences investment offer **predictable regulatory environments**, and efficient market access pathways.



Anna Rafferty Costello, Senior Director, EMEA Government Affairs & Policy Supply Chain Tech Ops & Risk, Johnson & Johnson, provided an intervention in Panel 1.

Message 4: Global Cooperation on Health for Economic Security

In a context of geopolitical uncertainty, demographic pressures and supply chain vulnerabilities, health and life sciences must be recognised as **central drivers of economic security**. However, both at national and international levels, economic security cannot be achieved through fragmentation or inward-looking strategies. Achieving this objective requires strengthened global cooperation, anchored in structured public-private collaboration. Together, governments and industry must align coordinated investment strategies. For instance, diversified and transparent global supply chains (grounded in trade openness and trusted partnerships), provide sustainable resilience. Thus, the importance of **multilateral platforms**, including the OECD, the G7/B7 and G20/B20 Summits, among others, is crucial in advancing shared evidence and peer learning, with a coordinated policy action.



The Ambassador and Permanent Representative of Greece to the OECD George Pagoulatos, provided an intervention in panel 2.

Message 5: Artificial Intelligence and Digital Health as Enablers of Competitiveness

Competitiveness in health, and more globally in life sciences, is no longer defined solely by the ability to generate high-quality innovation, but by the capacity to scale and **translate innovation into measurable health and economic value**. Across many OECD countries and beyond, adoption is slowed by fragmented data systems and/or misaligned incentives. Governments must therefore strengthen the entire innovation pathway (from implementation to system-wide diffusion) supported by outcome-based evaluation and evidence-driven investment decisions. In that context, Artificial intelligence (AI) and digital health are powerful **enablers of productivity and cost control**. Realising their full potential requires interoperable and trusted data infrastructure, with targeted workforce upskilling. Aligning health policy with both AI strategy and industrial competitiveness within a single framework is essential. This objective will require structured public-private collaboration and international alignment to ensure interoperability and global competitiveness.



Emile Jockey, CEO of the French Healthcare Association, provided closing remarks.

Conclusion

Overall, the Roundtable reaffirmed a strong consensus: investing strategically in health and life sciences is not only essential for societal well-being, but a prerequisite for long-term economic competitiveness for our economies. The challenge ahead lies in moving decisively from recognition to implementation.

The evidence is clear: countries that prioritise both coherent and cross-government health policies are better positioned to drive productivity and attract investment to strengthening economic security.

To translate the shared vision into action, participants emphasized three priority areas:

- the need to **align health, economic, and industrial policies** through coordinated whole-of-government frameworks;

- to treat **health as a strategic investment** within fiscal and economic planning to support productivity and competitiveness; and
- to **strengthen public-private partnerships** and global cooperation as a foundation for resilient life sciences innovation ecosystems.

Looking ahead, the main task will be to translate this shared vision into coordinated, actionable policy frameworks that align health and economic strategies. This will require both sustained public-private collaboration and predictable regulatory environments.

As highlighted throughout the discussions, the opportunity is significant: with the right policy conditions, health and life sciences can become a powerful engine for growth and competitiveness across OECD economies and beyond.



Participants of the High-Level Roundtable on Health and Life Sciences Competitiveness in January 2026.



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